

\*Indicates required field

## Instructions

- Schedule performance appraisal meetings with each of your direct reports and encourage them to complete a self-appraisal at least one week prior to the meeting.
- Complete the Performance Appraisal form, using the self-appraisal for input.
- Save the Performance Appraisal as a Draft (**Save as Draft**).
- With a printed copy of the Performance Appraisal, meet with each employee to review, discuss and finalize their performance.
- After the appraisal meeting, make any necessary changes to the appraisal and save it (**Save and Submit**).

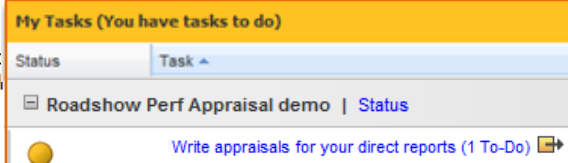
**NOTE:** After you "Save and Submit" you will not be able to see the appraisal form in Halogen. Once your direct report completes the final "Sign off" step in Halogen. It will then appear in My Employee Evaluations.

**Step-by-step instructions** for completing the Performance Appraisal form.

## INSTRUCTIONS FOR COMPLETING THE PERFORMANCE APPRAISAL

Log on to Halogen. Your Home page shows you have a task to do.

Click on the task.



## Employee Sign-off

This is the final step in the annual appraisal process. Please review the appraisal, add your final comments in the Employee Comments section (optional), and click the "Sign off" button located above the form. Once you sign-off, your annual appraisal will be saved in My Performance under Evaluations.



## Annual Performance Appraisal

### Employee Identification

Name:  Job Title:   
Department:  Supervisor:

### Evaluation Period

Evaluation Date:    
Review Period: From:   To:  

### Overview

The performance appraisal process provides a summary of progress toward meeting performance expectations and an assessment of job success factors. The Overall Rating is based on the combination of BOTH Work Expectations and Job Success Factors.

### Evaluating Work Expectations

Evaluate work expectations by selecting one of these ratings: Meets, Does Not Meet

Describe accomplishments with respect to each expectation. Provide information about how the standard(s) were met or not met.

#### Meets

Generally meets or exceeds the standards set. May occasionally miss a standard. Shows consistent performance during the appraisal period. Fully acceptable performance.

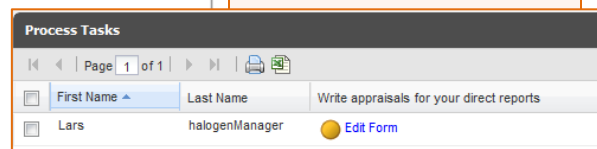
#### Does not meet

Does not meet the standards set. May occasionally meet standards but not consistently. Cannot be counted on to complete work assignments. Improvement is required.

#### Not Applicable

Select this rating only when there was agreement not to work on the expectation during the evaluation period.

Then click on Edit Form to open the performance appraisal.



**Read the Instructions .**

Fill in the evaluation date and the evaluation period.

**Read the Overview**

**Read about Evaluating Work Expectations.**

## Work Expectations

Goal



Rating:

Standard

Accomplishments



Attach Feedback



Add Past Work Expectation



## Evaluating Job Success Factors

The six Job Success Factors below apply to all City employees. Rate the employee on each of the factors listed. Supervisor's **must** add comments to support their rating. Suggested comments can be accessed by clicking the icon below the Comments box.

### Exceptional

The employee frequently demonstrates exemplary performance that far exceeds position requirements in this Job Success Factor. The employee makes a unique contribution that has a significant and positive impact on the success of the unit, division, department, or City. Performance is of a rare quality found only in a small percentage of people within the organization.

### Exceeds

Performance in this Job Success Factor consistently exceeds expectations in all areas of responsibility. The employee frequently goes above and beyond what is required. The employee frequently models this Job Success Factor.

### Meets

The employee consistently demonstrates solid performance in this Job Success Factor. The employee meets and sometimes exceeds expectations in all areas of responsibility. Fully acceptable performance.

### Does not meet

Performance in this Job Success Factor does not consistently meet position requirements. Immediate improvement is required.

Please reference the [Job Success Factors - Rating Guide](#) to assist in selecting the appropriate rating for each Job Success Factor.

Major Job duties, outcomes and standards entered during expectation-setting will pre-populate into the form.

There should be 3 – 5 expectations.




You can edit goals if necessary. Discuss this with your employee.

Rate each Work Expectation (Meets, Does Not Meet or Not Applicable)


Enter accomplishments that help explain the rating.


**Read the definitions that apply to the Job Success Factors.**

## Job Success Factors

	Ratings Scale	Comments:
<b>Customer Focus</b> Meets the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; establishes and maintains effective relationships with customers and gains their trust and respect.	----- ▾	
<b>Functional/Technical Skills and Job Skills</b> Has the functional and technical knowledge and skills to do the job.	----- ▾	
<b>Quality of Work Output</b> The quality of goods and services produced in terms of errors, waste, and rework required to meet standards.	----- ▾	

Rate each of the 6 Job Success Factors.

You **are required** to add a comment for each Factor. If you need ideas, click on .

When you click on , the comment will default to Meets.

You need to slide the scale to see other levels of comment.

**Productive**  
The extent to which the employee is productive in a variety of ways.

**Peer Relations**  
Can quickly form good relationships with all; is fair to other employees; encourages cooperation; encourages reviews and

**Self-Knowledge**  
Knows personal strengths and limits; seeks feedback; is open to criticism; is open to reviews and

Suggested Comments

Employee:  
Competency: Customer Focus

Performance Comment

Select a category below and then adjust the comment level and nuance for the selected category.

Service Delivery


Customer expectations

Seeks input from customers

Gains the customers trust

Employee's Gender: ☒ Male ☐ Female

Comment Level: Meets ▾

Nuance: 

Suggested Comment:

(Name) can generally recognize all the City's various stakeholders (e.g., residents, business owners, etc.) as customers. He/She demonstrates cultural sensitivity, courtesy, empathy and respect when interacting with customers. (Name) leaves a positive impression in interactions with customers. (Name) recognizes City employees as internal customers. He/She provides

Add to Your Comment

Your Comment:

OK

Cancel

## Supervisor's Overall Rating and Comments (based on Expectations and Job Success Factors)

	Ratings Scale
The Overall Rating is based on the combination of BOTH Work Expectations and Job Success Factors.	<input type="text"/>
The relative weight and importance of work expectations and job success factors are determined by the supervisor. The Overall Rating is NOT an average of the above ratings since some performance areas may be more significant than others.	

 Attach Feedback

### Comments

Overall Comments



### Employee Comments

Employee may add final comments about their performance for this review period.

### Comments

Comments



### Saving the Form

There are two save options that appear above the form.

- 1) If you have not completed the form and would like to continue editing it at a later time, click "Save as Draft".
- 2) If you have completed the form and do not need to make additional edits, click "Save and Submit".

**NOTE:** If you try to print this form before saving, the form will be blank. You must do **Save as Draft** prior to printing the form.

Read the instructions.  
Enter an overall rating  
(Exceptional, Exceeds,  
Meets, Does Not Meet)

Add Overall Comments

**STOP HERE**

**Save as Draft**

Press **Save as Draft** at the top of the form if you need to working on it.

**Save and Submit**

Press **Save and Submit** at the top of the form if you have completed the form and have no additional edits.

Once you

**Save and Submit**

the form goes to you employee for comments and electronic signature.

Print a PDF copy for yourself.